



Building an **Individual Transportation Plan**

UNITED WE
RIDE
COORDINATING HUMAN SERVICE TRANSPORTATION

Introduction

President George W. Bush released an Executive Order on Human Service Transportation Coordination in February 2004 to improve human service transportation coordination for individuals with disabilities, older adults, and people with lower incomes. The Executive Order established the Interagency Transportation Coordinating Council on Access and Mobility (CCAM), representing 11 Federal departments. A broad range of Federal funding provides for transportation services—in fact, there are 62 different Federal Programs that support human service transportation (General Accounting Office, June 2003). The CCAM has launched United We Ride, a national initiative to implement the requirements of the Executive Order, which requires Federal Departments to simplify access, reduce duplication of Federal rules and regulations, and increase cost efficiencies using existing resources.

The Role of Transportation in Education, Employment, Health and Human Services

Individuals (and/or families) receiving services from your agency may have difficulty getting around their community. For many people receiving transportation services—taxis, vans, buses or other options—it is not a choice but rather a necessity. Due to age, temporary or permanent disability, or low income—individuals may not have access to private automobiles. Without ready access to transportation, simple daily activities become all but impossible to accomplish. For example, a medical appointment may be beyond the reach of a young mother with several toddlers without a vehicle.

Education, employment, social and health services agencies often identify missed appointments as a frustrating and costly issue in service provision. Yet, it is rare for a health or social service agency to include questions related to transportation during the eligibility screening process and at intake. Uncovering how individuals and families can navigate their community helps service providers better understand the reasons for late arrivals, missed appointments, resistance to following through with referrals, or the inability to maintain employment on a long-term basis. Assistance with transportation may open the door to a new, more independent life for individuals and their families.

Obtaining information about an individuals' or family's mobility options during the intake and screening process can assist agency personnel in efforts to support independence. If agency personnel are familiar with transportation options, it enhances the dialogue with the consumer and their families. Here are examples of the types of questions associated with probing mobility issues and options that staff may want to explore:

- Do staff members know how to travel across town on the community bus system?
- Can staff arrange for daily transportation to and from work for someone with a significant disability (e.g., person who uses a wheelchair or scooter; has a cognitive impairment; or sensory limitation)?
- Does staff know what types of transportation services are available in the community?
- Are staff and customers familiar with the transportation services that operate during business and non-business hours?

This document is designed to help transition specialists, employment counselors, social workers and other human service agency personnel understand how the availability, or lack of transportation services, impacts individuals receiving services. By becoming familiar with transportation services and routinely including transportation as a point of discussion during intake and service provision, individuals receiving services will have a better chance of using agency resources to meet their goal of independence and community inclusion.

Policies That Impact Local Transportation in your Community

Let's begin with the information required from your agency.

Does your agency have a policy that determines if transportation services may be provided to assist individuals to access to agency services?

The provision of transportation services is determined by rules or regulations of the funding agency. Whether these are Federal, State or local public sources, private sources or third party payments such as health insurance, potential transportation services are governed by these rules. Transportation is an allowable service (often called a support service) in some education, employment, rehabilitation, health and social services programs but not in all of them.

Does your agency have the ability to pay for transportation? How is the trip cost covered?

Payment for transportation services can take the form of cash payments to the individual or the transportation provider. Vouchers, tokens, and/or transit passes are sometimes used in place of a cash payment. Reimbursement is sometimes available for an escort. In addition, the total or partial cost of a trip may be reimbursed to the individual after the trip has been taken. In some instances, the agency can negotiate a certain number of trips under a contractual arrangement. Some agencies provide transportation with in-house vehicles or have volunteers identified to provide rides. Paying for the cost of a trip can take many forms. Agency supervisors, directors or administrators should be able to provide additional information.

Does your agency have a preference or a rule that determines the type of transportation that can be provided or purchased?

Education, employment, health and human service agencies are guided by rules and regulations originated from numerous sources such as a parent organization, a municipality, or a funding or regulatory agency at the local, State or Federal level.

Does your agency offer consumer education and/or travel training to help individuals learn how to safely navigate within and around the community using public transportation?

Often, individuals can have access to public transportation; however, the system can sometimes be confusing and/or difficult to use. Many programs have the ability to either conduct travel training or pay for this type of service.

There are often different rules and requirements for each program that can often be confusing. For example, some of these rules focus on the rights of individuals receiving services. Other rules focus on issues such as driver qualifications, mixing groups of people receiving different types of services, and serving people who do not receive services from the agency. There may be a circumstance when individuals are required to accept rides from friends or family members as a first resort. Understanding and communicating what rules apply to arranging and paying for transportation services provides great value to individuals and their families.

Points to Consider

Individual, Family Information and Concerns

To further the collaboration process between agency staff, program participants, and family members when selecting the best types of transportation, the service provider should review the following questions with the program participants.

Community Mobility

When attempting to match the individual and the available transportation options the consideration of mobility aids can be very useful. This assessment gathers information on the person's mobility skills and limitations. The assessment may include but may not be limited to:

- Use of a mobility device such as a wheelchair, scooter, walker, cane or other assistance.
- Ability to walk or climb stairs.
- Ability to read and understand printed maps or schedules.
- Ability to communicate with transportation providers, (e.g., hearing, understanding or processing verbal information).
- Ability to use turnstiles, card readers or other devices for riders entering and exiting transportation stations.
- Ability to understand or speaking English.
- Ability to get around independently and safely

Transportation Needs

Adequate trip planning requires specific understanding of each portion of the trip—when, where, how often, and who.

- What is the origin and destination of the trip?
- How many trips will be taken in a day?
- Will the trip be interrupted by intermediate stops, such as taking children to a child development center or grocery shopping?
- Who will be transported?

In addition to the specific details of the trips, there are a number of more intangible concerns that the individual may have about using certain transportation options in the community.

Convenience

The ease with which individuals are able to initially and successfully plan a trip, pay the fare, board, ride, exit the vehicle, and navigate the environment to their final destination will help to better determine a person's ability to use the service on a regular basis. Therefore, early support for individuals who need assistance allows the consumer to build confidence and prepare the groundwork for independence and autonomy. Agency personnel can also benefit when they are aware of proximity of the person's departure point and the transportation route, the vehicle timetable and the individual's comfort level.

Reliability

As with individuals using private vehicles on the highway system, every traveler experiences late arrivals to their destinations. Transportation services can have unique challenges such as off-peak timetables, vehicles malfunction, or delays when waiting for passengers sharing a ride. The reliability of transportation services can be an issue when traveling to an appointment or employment, where being on time is important. Agency personnel are encouraged to engage in discussions regarding what steps to follow when challenges arise.

Cost

The cost of the service will most certainly be an issue if the individual or family is responsible for all or part of the fare. It is important to look at an individual's monthly fare costs compared to his/her monthly income.

Safety

People routinely assess their own level of vulnerability when traveling, including when they are using a taxi, van service, a bus or other types of transportation options. Travelers are concerned about their skill level, their environment, the time of day and other issues. On the other hand, there are individuals who may appear to be unable to understand safety issues that you may perceive as posing a risk of injury to themselves and/or others. Agency personnel should be able to set aside possible assumptions about the capacity of the person to comprehend and address any potential safety issues by discussing the matter with the involved individual in a supportive and serious manner.

Comfort and Confidence

This is an extremely important question – as it addresses intangible issues often overlooked. If an individual lacks experience in using the selected transportation mode, if an individual is anxious, lacks confidence, gets confused, or appears to be easily side-tracked, agency personnel can work in partnership with the person to determine what supports can be put into place. It is recommended that the discussions include information about travel training, transit system familiarization, and other methods to teach and support independent travel.

Actions to Support Community Transportation

As agency staff develops expertise in community transportation services, they may find opportunities to support the improvement and coordination of these services. Concerns regarding the need for transportation alternatives in the community can be shared with colleagues, family, friends and community leaders. Many opportunities for advocacy are available for individuals interested in furthering transportation options and services in the local community. For further information on how to strengthen the transportation services in your area, please see the website of the Coordinating Council on Access and Mobility at www.unitedweride.gov. Information in alternative format is available upon request.

Individual Transportation Plan Template

This template includes a series of discussion questions when given considering the development of an individual transportation plan. Questions include but are not limited to destination, types of available services, and accessing those services and can be included (as part of the discussion) when developing plans for any individual that requires assistance with accessing employment, healthcare, counseling, rehabilitation, or other types of community activities.

Scheduling your Travel within the Community.

1. When do you need a ride (times and dates)?

2. Will you be traveling with members of your family or friends?

3. Where will you be going?

4. How close or far are these places from the public transportation route?

5. Do you need to make stops during the trip—e.g. grocery, child care, etc.,

(continues)

Information for Individual Transportation Planning:

1. Do you usually drive to where you need to go?

If yes, are there times of day, locations, or weather conditions where you restrict your driving?

2. Do you have experience with public transportation?

If yes, what is your experience in using public transportation?

3. If you do not have experience, is there a reason(s) why you don't use public transportation?

4. Do you use any equipment or support to help you move around either at home or when you go out?

- a. Manual wheelchair
- b. Power Chair
- c. Scooter

- d. Cane or walker
- e. Service or comfort animal
- f. Other _____

5. Do you travel with a paid staff person? Do you travel with a family member or friend? What supports do these companions provide for you?

6. Do you have a preference as to which kind of transportation service you use?

What are other types of transportation services you might consider for future use?

7. Are you comfortable reading and understanding transportation schedules, signs and instructions? What type(s) of assistance would be helpful for you?

Determine Transportation Needs/Resources for Individuals

(The attached template
has been provided for
your convenience)

1. When will you need transportation?

2. Can a family member or friend provide all or some of the rides requested? If so, when?

3. Are you eligible for any programs that reimburse for transportation expenses (e.g., gas, mileage, vouchers, bus pass, etc)?

4. What are the transportation services available in your community? (below are services to consider)

- | | |
|--|------------------------------|
| a. Public Bus | e. Volunteer Service |
| b. ADA Complementary Para-Transit Services | f. Taxi |
| c. Specialized Transportation | g. Faith based organizations |
| d. Agency vehicle | h. Other |

5. What is the process for scheduling a trip for each service listed above? (Please see attached template)

(continues)

6. What is the policy on trip cancellations and no-shows?

7. Is the individual eligible for financial transportation assistance?

- a. Full assistance
- b. Partial assistance
- c. No assistance

8. Please list the specific types of eligibility.

9. Is an escort eligible for transportation assistance?

- a. Full assistance
- b. Partial assistance
- c. No assistance

Individual Transportation Plan (TEMPLATE)

The following template has been provided to assist with researching options for the development of individual transportation plans. The template is for your use when exploring the transportation options in each community. (The following template is an example of how a completed template can look.)

1. List all available transportation options (add more rows if needed)
2. Identify travel routes
3. Who is Eligible to use this service?
4. Determine cost of travel, each direction
5. Decide when to use which service

COMMUNITY TRANSIT OPTIONS _____

System Features	TRANSIT OPTION ONE:	TRANSIT OPTION TWO:	TRANSIT OPTION THREE:
Where does it go?			
How to get info/make reservation			

Fare/What
"rider"?

Who is Eligible
transportation

When would
choice?

When would
choice?

Template is a product

COMMUNITY TRANSIT OPTIONS Watertown, USA

System Features	TRANSIT OPTION ONE: Transit Authority of Jefferson County	TRANSIT OPTION TWO: Retired Senior Volunteer Transit Program	TRANSIT OPTION THREE: Access-I-Ride
Where does it go?	North Loop, South Loop, and the Mall Loop	Jefferson County	Urban up to _ mile outside city limits
How to get info/make reservation	No reservation required. For bus schedule call Customer Information Department (716) 635-4000	Reservation required 24 hrs in advance. For scheduling information call Customer Information Department (716) 369-2371	Reservations required 2 hours in advance. Call customer information department (716) 225-0119
Fare/What is the cost to the "rider"?	\$2.00 per trip Half price for people with disabilities, students and seniors	\$2.00 each way	\$5.00 each way
Who is Eligible for this transportation service?	Available to the General Public	Only available for Older Adults	People receiving transportation reimbursement for accessing medical care.
When would this be a good choice?	Local city travel... along a fixed route during operating hours	Unable to use fixed route, travel outside operating hours, destination outside of fixed routes...	Unable to use fixed route
When would this be a poor choice?	After operating hours... Wkly 7 a.m.-6:15 p.m. Sat. 9:40 a.m.-5:35 p.m.		

Template is a product of Easter Seals Project ACTION

COMMUNITY TRANSIT OPTIONS

System Features	TRANSIT OPTION ONE:	TRANSIT OPTION TWO:	TRANSIT OPTION THREE:
Where does it go?			
How to get info/make reservation			
Fare/What it the cost to the “rider”?			
Who is Eligible for this transportation service?			
When would this be a good choice?			
When would this be a poor choice?			